Lessons Learned
PeopleSoft HRMS V8.0 Upgrade

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HRMS/Payroll Metrics

- Total BNL Employees: 2,900
- Total Salary/Benefits: ~ $250M per year
- Payroll Staff: 6 FTE
- HR/Benefits Staff: ~ 30 FTE
- PeopleSoft HRMS Support: 5 FTE

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HRMS Version Upgrade Summary

- Installed PeopleSoft V7.5 in time for CY 2000 processing. Replaced legacy system.
- After Y/E, started upgrade to V8. Focused on replacement of V7.5; not new functionality (e.g. self-service).
- Completed upgrade: October 2001.

Lessons Learned Topics

- PeopleSoft Upgrade Assistant
- Reporting
- Set-up Tables
- New Infrastructure
- Critical Path Issues

PeopleSoft Upgrade Assistant

- The PeopleSoft Upgrade Assistant is your friend. Use it. We initially lost time bypassing some steps.

- After Conversion, retest core functionality before making new modifications. This should flush out conversion errors and identify any PeopleSoft bugs.

- Consider reapplying modifications to PeopleSoft Panels (Pages) rather than bringing customizations forward through upgrade process. In some cases, it takes longer to redo what the conversion does rather than just reapplying modifications.

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Reporting

- Prior to PeopleTools V8.16, severe limitations in web query development. Full functionality will be implemented in PeopleTools V8.4.

- Some queries may need rewriting. Changes in record structure are not updated in the query. They simply stop working.

- Since reports now run on the server, this changes report distribution. For us, emailing in PDF format is popular choice.

- Put all customized SQR in a separate directory that won't be over-written with patches and fixes.

Set-up Tables

- Review all set-up tables after the initial conversion for errors or missing information.

- PeopleSoft puts codes from demo data (e.g. Earning/Deductions) in your production data. If these codes have later effective date, they will be used instead when you run payroll.

- This causes other problems down the line that are hard to diagnose. Example: Doubled dollars amounts in the ACH file.

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New Infrastructure

- Processing load is very much shifted from client to data center. Be sure to provide adequate server power.

- Web client is a big change for users. Get them involved early with new web pages.

- The upgrade is significantly different and more complex than V7. Additional focused consulting services should be considered.

- New security model in V8 is role-based. Security needs to be rebuild since it doesn't upgrade from old pre-V8 structure.

Critical Path Issues

- For us, user availability was a problem. Key users already have full-time jobs and have trouble devoting sufficient time to testing or training.

- Make sure there are dedicated DBA/Systems Administration people assigned to the project. The upgrade process is time consuming and roadblocks/bugs will be encountered.

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Next Steps

- **Self-service**
  - Employee information
  - ePay
  - eBenefits
  - eProfile
  - eRecruit
- **Employee web portal**
- **PeopleSoft LDAP Interface**
- **Meanwhile: Upgrade PS Financials to V8**